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ABSTRACT

This document presents a training module designed to help adult literacy program providers in New York and elsewhere to use the principles of social marketing to improve recruitment and retention in adult education programming. Literacy program providers are taught to view the social marketing process as a process of exchange between themselves as the literacy provider and their prospective students that is influenced by situational, program, social influence, receiver, and outcome variables. The specific competencies addressed in the training materials are as follows: (1) define marketing, outreach, public relations, and advertising; (2) list a range of marketing, outreach, public relations, and advertising strategies; (3) identify the characteristics of specific marketing segments; (4) develop strategies to identify and attract a range of market segments; and (5) package programs effectively. The following are among the materials included: definitions of terms related to social marketing; an overview of the operation of a social marketing campaign on adult literacy; specific steps in identifying and becoming familiar with a literacy program's target market segment; guidelines for developing a marketing campaign theme and selecting promotional materials; tips for using newspapers, television, and radio as marketing media; steps to writing better press releases; guidelines for evaluating a social marketing campaign; and a study survey instrument. (MN)

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Marketing Your Adult Literacy Program

A "How To" Manual

Revised 1996 by:
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With special contributions from:
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U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
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Foreword

The original "how-to" manual was developed to provide content to participants in the *New York - You Can Read* marketing training offered in the winter and spring of 1987. Over the years, we have used social marketing in a variety of applications. Our most popular application has been recruitment and retention in adult education programming. Almost ten years later, this manual still is helpful in setting down the principles and practices which result in the recruitment of additional adult learners and which ensure they stay long enough to accomplish their goals.

Originally, this manual was developed under the auspices of Interorganizational Relations, Ltd., which is no longer operational. The Hudson River Center for Program Development, Inc., in augmenting its staff development in recruitment and retention, has donated its resources in the revision of this manual.

Introduction

The purpose of this manual is to enable adult educators to market their services better and to reach students who are not currently served. By receiving training in the techniques of social marketing and the development of strategies that are designed to be sensitive to the needs of potential adult literacy students, adult literacy providers will be motivated to reach adults needing literacy services to seek help while realistically portraying what literacy can "deliver."

How can you reach adults?

How can you contact and recruit the adults who require literacy services?

What can you say to arouse their interest when they are reluctant to listen, when the message is potentially threatening?

By what methods can you increase your overall effectiveness in contacting and recruiting them?

How do you know if you are sensitive to their needs?

How can you gain the general public's support?

What type of resources and techniques can you use to achieve these goals?

The work starts by knowing the people who live in your neighborhood, community, and city. That's where your work begins — at home in New York.

Training Objectives

At the end of marketing training, participants will:

-- Define marketing, outreach, public relations, advertising

-- List a range of marketing strategies, outreach strategies, public relations strategies and advertising strategies

-- Identify the characteristics of specific market segments.

-- Develop strategies to identify and attract a range of market segments.

-- Package programs effectively.

The ABC's of Social Marketing

Marketing your adult literacy program is what this manual is all about. Social marketing, as it is called, refers to an exchange process whereby products of value are exchanged. More about the definition of social marketing will be discussed later.

Many social marketing techniques are based on the work of commercial advertisers or "Madison Avenue." Madison Avenue has been very successful making you believe that you need hamburgers or power tools or fabric softener or designer jeans. In fact, Madison Avenue's success is in making some segments of the population believe that they MUST have the latest in flavored sodas or lite beer or toothpaste. Social marketing's challenge has been to market those products -- services, persons or ideas — which are often seen as less critical to our very existence to a community whose support is necessary.

Services such as orchestras or the Boy Scouts of America or the local library are easier to "sell" than adult literacy. Fears, anxieties, uncertainties, shame, all conspire to make literacy difficult to sell. In addition, the population needing to become literate, particularly the most alienated and disadvantaged segment of the population, is by definition difficult-to-reach. This manual will help you get into your program the students who should be there -- those who need the services the most.

To start the instruction, you'll be using an exercise (see Page 4) that is helpful as an "Icebreaker" once all the introductions are over. If you are doing the exercise alone, see how many of the statements describe you. If the exercise is being done in a group, follow the instructions given.

In addition to very nicely breaking the ice, this exercise raises your awareness of marketing. Each one of the statements in the exercise is related to the field of marketing, illustrating that you already know quite a bit about marketing, based on your life experiences! That you know the answers already is a basic tenet of adult education. What training accomplishes is to help organize the information in a more usable form to accomplish your purposes. As the instruction continues, we will be returning to your knowledge quite often.

Exercise #1

DIRECTIONS: Note the name of someone in the group who is described by the following statements. Do not use the same person for more than one category unless no one else fits this description.

Someone who has been interviewed by the press (radio, television, newspaper):

_____

Someone who has been on a task force, an administrative committee, an advisory council or a board of directors:

_____

Someone who has helped a child sell cookies, calendars, candy, raffle tickets, etc:

_____

Someone who has worked on a political campaign: _____

Someone who has developed materials for an organization such as church or a civic group:

_____

Someone who has worked in an agency or organization (other than an adult literacy program) serving a disadvantaged or disenfranchised population:

_____

Someone who has collected for charities or the United Way:

_____

Someone who has made a living as a salesperson: _____

Someone who loves television commercials: _____

Someone who has "sold" his/her boss on a great new (but costly) idea:

_____

Someone who always gets asked to be on committees for planning functions:

_____

Someone who manages the family finances: _____

Someone who always gets asked to make presentations to public hearings, school board meetings, planning or zoning meetings:

_____

Someone who plans all the family vacations: _____

Exercise #1 shows that you already understand marketing conceptually. In order to become a successful social marketer, you must familiarize yourself with some basic terms to develop an understanding of the marketing process and to become versed in the language of marketing. But first, we offer a little background.

The advertisement or commercial is a phenomenon as familiar to us as the air we breathe. For as long as we can remember, the sounds and images of things to be consumed have permeated our culture and our consciousness. Consider the fourth century Roman historian, Juvenal, who is often used to emphasize the longstanding concerns of urban life. In one of his essays, he laments the various kinds of noise with which he has to contend in "downtown" Rome. As a night owl, he is bothered by the constant comings, goings and loud conversings of his fellow apartment dwellers. Juvenal is even more disturbed by the rattling of the chariots being driven too fast by the youth of the city, as well as by the 4:00 a.m. clatter of the farmer's cart over the cobble stones as he preceded his fellow vendors to the marketplace. Here, surely, was the most eager and enterprising merchant of them all!

Clearly, the marketplace has always been a competitive forum and the goal of the merchant is that of getting his/her product there first. Today, this is not a matter of physically reaching the marketplace ahead of one's competitors, but rather of reaching into the minds of potential buyers and convincing them to make your product their first choice. Therefore, concepts such as advertising, marketing, outreach and public relations have come to replace the wagon with wooden wheels being hurried along cobblestones early in the morning.

Definitions

Let's go on to some definitions now. The following are terms that will be used throughout this manual:

Social Marketing

Social marketing is an exchange process in which the provider offers programs or products of value to the client so that the client's quality of life is changed and moved towards a more positive, self-sufficient direction. In the case of adult literacy services, the provider or educator offers such things of value as classes, diplomas, time and help to the client or learner in exchange for the learner's time and commitment, which are the learner's valuables.

This process assumes that each party — the provider and the prospective student — is capable of communication and delivery. Another assumption is that each party is free to accept or reject the potential exchange. Always remember, however, that acceptance or rejection of adult literacy services may well be a function of the extent to which the provider is sensitive to the fears and denial of the potential learner.

We can also define social marketing as the design, implementation and control of programs seeking to increase the acceptability of a social idea or practice in a target group. If successful, the marketing usually encourages people to do something that will be beneficial to others in addition to benefitting themselves.

Public Relations

Public relations is the projection of an image. An effective public relations program on adult illiteracy requires a thorough understanding of the message, of the desired population, and of the most efficient means of conveying that message to the desired population (i.e., adults who need adult literacy services).

Advertising

Advertising brings the adult literacy service to each potential adult literacy student via the mass media and "pre-sells" it through the advertisement.

Outreach

Outreach is the process of contacting and recruiting adult literacy students, including organizing various community agencies and service providers.

Promotion

Promotion is the communication of the existence, quality, and nature of programs which address the needs, wants, and beliefs of identified market segments to the potential students.

Target Audience

Target audience is the population of adults who require adult literacy services. Once this group has been identified, the agency channels all of its energies, efforts, and dollars to reach this population.

Market Segmentation

Market segmentation is the division of the target audience (see definition above) into subsets of homogeneous adults who require literacy services, where any one subset may conceivably be selected as a target audience to be reached.

Questions and Answers

Q: What do these terms have to do with my program?

A: These basic terms provide a common vocabulary in which to communicate, just as reading opens doors for illiterate adults. Once we're all using the same language, the process of marketing adult literacy services requires knowing your population, what they want, how to provide it, and letting them know it's available in terms they understand.

A client-centered program or agency wisely recognizes that it cannot meet everyone's needs with a single service, nor can it produce sufficient numbers of diverse services to accomplish this goal. Therefore, the challenge to adult literacy providers is to identify the consumers who are potential adult literacy students. Equally important, the program or agency must be assured that the service satisfies the needs of this group in order to result in meaningful exchanges.

So, the processes of social marketing to adults needing literacy services (target audience) with a special emphasis on identifying and recruiting a specific population (market segment) are identifying the desired population(s), recognizing their needs and desires, and providing or tailoring services to meet those needs.

In summary, you must:

--identify and recruit adults who cannot read;

--provide them with the type of services which are sensitive and relevant to their needs and desires;

--develop messages which are presented in terms that are non-threatening and can be understood; and

--choose channels of communication which they can hear.

In this way, you will be marketing your services to adults who need literacy services to accomplish their goals.

An Overview of the Operation of a Social Marketing Campaign on Adult Literacy

Social marketing has been defined as an exchange process in which the provider offers programs or products of value to the prospective student so the student's quality of life is changed and moved towards a more positive, self-sufficient direction. The process of reaching prospective students requires thoughtful planning.

The model on the next page illustrates the range of possibilities that can occur in the exchange transaction.

In the exchange process of social marketing we see two major actors: you, the adult literacy provider, and the prospective student. As you can see from the model on page 9, you (Adult Literacy Program) and the prospective student (Prospective Learner) will engage in actions, communicate, and exchange information in order to influence the exchange.

The adult literacy provider should effectively communicate such qualities as credibility, expertise, trustworthiness, authority, flexibility, caring, and responsibility.

On the other hand, the prospective student's perceptions of these qualities will be influenced by self-confidence, sense of self-esteem, life experiences, conflicts, anxieties, fears, and values. The ultimate decision to attend the adult literacy program will also be influenced by such situational variables as employment status, opinions of family and peers, individual needs, socioeconomic status and previous educational experiences.

Prospective students will also be influenced by their notions of the range of possible outcomes associated with attending the adult literacy program. A number of outcomes are possible. The student may or may not get a job which may or may not result in additional income. Family and peers may approve or may not, depending on their perceptions. Self-satisfaction and pride may or may not be an outcome of the program, depending upon its effectiveness in meeting the needs and dealing with the fears of the student. The adult literacy program may provide a social environment for the student or it may not.

In marketing adult literacy programs, you must keep in mind the complexities of the exchange process illustrated on the following page. The outcome of the initial transaction can be positive or negative and depends heavily on your careful planning and follow-up procedures.

MODEL OF THE INFLUENCES ON EXCHANGE

Situational Variables	Source Variables Adult Literacy Programs	Social Influence Variables	Receiver Variables Prospective Learner	Outcome Variables
1. Employment status 2. Opinions of family & peers 3. Needs 4. Socio-economic status	Safety Credibility Expertise Trustworthiness Authority Flexibility Caring Responsibility	Actions, Communication, Information, or Promotion	Self-esteem Self-confidence Conflicts Abilities Fears Values Racial/Ethnic background Life experiences Uncertainties	1. Job 2. More $ 3. Approval of family & peers 4. Self-satisfaction 5. Pride 6. Social context

Source: Diagram adapted from Phillip Kotler and Alan R. Andreasen, *Strategic Marketing for Nonprofit Organizations*, Prentice-Hall: New Jersey, 1987.

You, the provider, will be offering such valuables as time, help, classes, and diplomas to prospective students in exchange for their time and commitment. Adult basic education, English for speakers of other languages, high school equivalency instruction, and volunteer tutoring are all examples of the types of services you will be exchanging.

Whether prospective students are willing to participate in this exchange process depends a great deal upon the extent to which you are able to "sell" your adult literacy service to them in a message that they can hear or receive. Remember they are not necessarily anxious to change behavior or to receive new and sometimes threatening information

For clues on how to break through the defenses of prospective students, it is useful to look at some lessons we have learned from the health promotion experience which, though long and arduous, has begun to pay off in changed behavior and improved health status. Decreases in the number of smokers and more careful consumption of red meat and dairy products speak to their successes. According to that body of literature:

1. Exposure to the message must be assured through careful consideration of target group characteristics.

2. Attention to the message must be assured through the use of appropriate media, communication, and message content.

3. Acceptance of a message is aided by:

   - ✓ a credible source
   - ✓ concise and simple content
   - ✓ motivation, arousal and entertainment value
   - ✓ repetition
   - ✓ social/interpersonal support

4. The probability of behavior change is enhanced by message strategies that provide explicit instruction for change.

5. The probability that behavior change will be lasting is improved when a socially supportive environment reinforces change.

If you are able to "sell" literacy to prospective students (i.e., you fashion the message in a manner that is heard), the exchange transaction is successful. And the students exchange their time and commitment — precious commodities deserving of great care!

Marketing the Product

Once the overall concept of social marketing is clear, then we move on to the actual process of marketing your literacy services which involves the following steps:

(1) identifying the market segment

(2) assessing needs and desires

(3) developing a marketing plan

(4) communicating the message

(5) assessing the match between services and clients

(6) evaluating techniques and results

An approach has been designed so you can follow a step-by-step process.

The first step is identifying the market segment; that is, you will determine which segment of the prospective adult learner population is underrepresented in your program and over- represented in the community.

The second step is beginning to develop a marketing plan to attract the adult learners who require literacy services. Communicating via a message or well-defined theme is the third step. The fourth step is the creation and implementation of the marketing plan for the campaign.

The fifth step will assess the match between services and students to ensure literacy services are relevant to the market segment in your area. And, finally, the techniques and results will be evaluated.

Beginning the Marketing Campaign

The marketing campaign begins with a close examination of the market segment. To which part of the target population of illiterate adults are you going to aim your marketing efforts? Think about what prods you or pushes you, the messages you receive that get you to do certain things. Look at some of the education you have pursued and why you have done so. Either by yourself or in small groups, list a class, a seminar, a program or a course which you attended and the "message" you received which motivated your attendance. Read the examples which participants gave in some of the workshops and then fill in your own.

Course	Message
Baccalaureate Degree	First one in family to get degree, important to family status
Conversational Spanish	Broaden one's knowledge
Automobile Mechanics	Feel sense of safety and security when driving
_____	_____
_____	_____

You will probably find that the reasons why you pursued the various educational avenues have to do with self-esteem, social approval, self-expression and/or fulfillment. Think back now to Maslow's work on human motivation and the classification of human needs. In brief, his hierarchy of needs is arranged thusly:

Self-actualization needs
(self-fulfillment, self-expression)

Esteem needs
(self-respect, prestige, social approval)

Love needs
(affection, belongingness, identification)

Safety needs
(security, health)

Physiological needs
(hunger, thirst)

As you probably recall, Maslow posited that a "lower" need had to be satisfied before a "higher" need emerged as a determinant of behavior (e.g., a starving person does not focus on behavior aimed at generating social approval). Maslow's paradigm can be very helpful to you in beginning your marketing campaign by pointing out a common error in social marketing.

Often, budding social marketers attempt to communicate and motivate using their own "messages" which are really their values. Thus, if they seek education because their family feels it is important to their status or because they will feel a sense of belonging or they will be fulfilled, it is a temptation to use these same messages or values when trying to recruit their market segment. The trick is developing a campaign which will satisfy not your needs but the *consumer's or potential student's needs in a desirable way*. And to do this, you have to know the market segment very, very well.

You will now move to define the market segment by choosing a SMALL SECTION of the population of adults in your community or neighborhood, one that you know is out there but underrepresented in your program. Some workshop participants' examples are:

-- Unemployed youth between the ages of 18 and 21 in Tompkins County

-- Unemployed black males between the ages of 21 and 25 in East Harlem

-- AFDC mothers under 25 in the Capital District area

Once you have clearly and carefully defined the market segment, then you can begin to get to know that segment very, very well. Filling out the form on the following pages will help you in this close examination.

You may find as you're filling this out that you have a reluctance to closely examine your identified market segment. You are not alone. Others have identified a sense of discomfort about writing down the things they were thinking, dismissing them as stereotypic or unenlightened. This discomfort must be confronted to successfully recruit the segment you desire. Call it unenlightened; call it values conflict; call it whatever you wish. None of us is perfect. We all have family backgrounds, experiences, histories that make us what we are, that make us feel the way we do. If you want to attract your market segment to your program, admit that you have a sense of discomfort. But remember that you have to use the potential students' values, needs and likes rather than yours in the campaign — and move forward.

On the next few pages, you will find additional information on operating a social marketing campaign. This information will be helpful in completing the form. Also, use your creative energies to think of "key informants," people who know the market segment — their needs, desires, fears and frustrations. These informed people might be in your adult literacy program; they might be graduates, friends, friends of friends. Reach out and ask them for help. You'll find that you have all the information you need about your market segment in a short period of time.

Exercise #2

1. From the market segments identified, choose the market segment on which you wish to concentrate. (Refer back to page 13.)

2. What sources of aggregate population and economic data are available to get an overview of the immediate socio-economic environment?

--Census data
--Labor trend data

3. Describe in as much detail as possible the market segment. Where are they? What do they look like? How much money do they have? What are their likes and dislikes, etc.?

4. Describe the economic/employment picture for the identified market segment. Where do they work now? Is new employment coming to the area? Is the area losing jobs?

5. Describe the values of the identified market segment (i.e., family, education, work, types of recreation).

_____

_____

_____

_____

6. Describe which of your values are consistent with those of the identified market segment. What values do you have which conflict with those of the market segment? Describe how these value conflicts may interfere with your marketing/outreach and program planning.

_____

_____

_____

_____

7. List your objectives for the marketing campaign for the identified market segment. Remember that objectives are specific and measurable (e.g., to recruit 15 new adult students from the 0-4.9 reading level who are on public assistance).

_____

_____

_____

_____

8. Describe the total feelings, impressions and image you want the "buyer" to have about you, the people with whom you work, and your program.

_____

_____

_____

_____

_____

And finally, some summary points for you to think about as you try to reach your market segment:

-- Know them — their values, their fears.

-- Love them — don't judge or fear them.

-- Connect the offerings of your program to some real need they have.

-- Go directly to them, wherever possible, for input regarding program content and presentation that would most appeal to them.

Identifying and Getting To Know Your Market Segment

Identifying the characteristics of your market segment is an initial step in reaching a target population. Again, you must know the segment very, very well. The most relevant characteristics of the target group are considered to be:

age	ethnic background	geographic location
sex	income levels	transportation habits
race	reading level	points of contact with the public system

Targeting:

When these characteristics are identified, a further analysis of the data may reveal a key audience among the target group; that is, you can begin to speculate which group is difficult-to-reach. In your area, you may discover, for instance, that white men, aged 18 to 25, who are high school dropouts, are underrepresented in your program. Or, that young non-English speaking women, aged 35 to 45, are the difficult-to-reach group within the target audience in your area.

It's important to remember that you are identifying an invisible population; that is, you are trying to reach underserved adults who have probably not been identified through existing private and public literacy efforts.

Therefore, your area may have potential clients who have not been identified in any other region. The importance of knowing your area and its needs cannot be more highly underscored or stressed.

Furthermore, you may find that your key audience uses public transportation, when it is available, and may have contact outside their homes at the following places:

Points of Contact

Adult basic education programs
Literacy Volunteers of America (LVA) programs
Programs for Women, Infants & Children (WIC)
Health clinics
Head Start sites
Family-operated day care
Hospitals
Nursing homes
Catholic Charities
Other religious charitable organizations
Departments of Social Services
Families in Crisis programs
Visiting Nurse Association
Family Court
Probation intake
Correctional facilities
Religious groups
Public housing
Domestic violence shelters
Cooperative Extension offices
Ethnic grocery stores
Community centers
Public libraries
BOCES/continuing education programs
Community colleges and other post-secondary institutions
Food pantries
Food stamp sites
Check cashing sites
OTB
Family service agencies
Radio and television public service announcements
Unions
Local businessmen (employers)
Drug abuse and alcoholism rehabilitation facilities
Offices of Vocational Rehabilitation

Although many prospective adult learners may not be served through private and public literacy efforts, they may be receiving other types of services through which they can be identified and reached. Through identifying and targeting and then networking with other providers of human, social and educational services, prospective adult learners can be recruited for literacy services.

The following suggestions adapted from Mary Lindenstein Walshok's *Capturing the Adult Market: UCSD's Experience* will help you to organize your strategy for identifying an adult market segment for your area in New York State.

IDENTIFYING MARKET SEGMENTS

Assessing Overall Demand

What sources of aggregate population and economic data are available to get an overview of the immediate socio-economic environment?

-- Census data

-- Labor trend data

-- Indicators of trends in economic development

-- Population trends: age, family size, migration patterns, residential data, educational attainment, occupational distribution of local population

Targeting Demand

What local data/indicators are available to help locate "pockets of demand?"

-- Major industries and types of employees

-- What government programs are in place to help economic and employment development?

-- What private capitalization is taking place; what product or service areas are at the top of this list; how much money and how many people will be affected by this capitalization?

-- What is the demographic profile of the area, broken down by such things as residential and industrial zones, educational attainment, occupational characteristics and income levels?

-- What have been identified as high priorities in the human resources area by local business and local government, among local opinion and community leaders, and by local voluntary organizations?

What are the major motivators for education in the community?

-- How much and what kinds of education are required for entering, maintaining and advancing in particular jobs? What are the new social and economic developments on the horizon in your community, and what education or training needs might these represent?

-- What are the normative and cultural motivators in your community; what are some of the traditions, sources of status, and lifestyle priorities that influence educational decisions?

-- How mobile geographically and socioeconomically is the community, and how does this affect the character and quality of education sought?

Assessing "Market" Position

What other institutions and organizations are providing education for adults in the community?

- Educational institutions
- Employers
- Churches, libraries, social and cultural organizations
- Proprietary organizations

What is unique and special about your services?

Where does education fit in the target population's priorities?

-- How do people in the community already spend their discretionary time and money? For example, on arts and culture, outdoor recreation, family activities, personal development, socializing, religious activities?

-- How do people use and distribute their time across a typical day or a typical week, and when would they be most likely to want educational activities?

-- Are people able to pay for such expenses as transportation, books, day care, etc.?

Selling your Program

Developing a Theme

What makes a message effective? Let's look at what Madison Avenue does very effectively -- conveying the message. Do you remember:

To look sharp every time you shave,
To feel sharp and be on the ball,
To be sharp, Use Gillette Blue Blades,
It's the quickest, slickest shave of all!

If you're too young to remember that, think of an advertising jingle which has really captured your fancy. Think about selling something that you know about. Think of a product slogan or jingle. Where did you see it/hear it? Why did you remember it? Does it leave you with a positive or negative feeling? Do you know why?

WHY IS THE MESSAGE EFFECTIVE?

_____

_____

_____

_____

_____

_____

_____

Some of the reasons we came up with in training workshops were:

The jingle is catchy.

It appeals to the way we want to look and feel.

It's clever.

It's easily remembered.

The gong in the jingle associates the jingle with boxing and therefore — masculinity.

And it is catchy. Some of us have remembered it all these years, even though we had little use for razor blades when we first heard it.

Would that advertising jingle work today? We decided it wouldn't because it does not aim for a particular market segment. At the time the ad was popular, there was not a glut of razors and blades on the market. Today, the ad would have to be aimed at a particular market segment, since the competition is tougher.

Let's examine some more ads. Look at advertising in magazines and on radio and television. Ask yourself the following questions:

What is/are the message(s)?

To whom is it targeted?

Is the advertisement effective? Why or why not?

Finally, from the work you just did, list all the reasons why the various messages were effective.

WHY THE MESSAGES ARE EFFECTIVE

_____

_____

_____

_____

_____

Keep this list in mind as you continue to work.

Answering these questions may enable you to communicate the message of adult literacy to the general public and potential clients who require sensitivity to the fears, guilt, and stress that frequently accompany an adult's recognition of his/her illiteracy.

If the message engenders too much fear without adequate reassurance, coping mechanisms cannot be brought to bear to alleviate the fears, and the market segment will respond by subconsciously ignoring the message. Illiteracy is not a comfortable idea for most of us, nor is it necessarily part of our self-image. The joy of literacy needs major communication efforts to counteract the stigma of illiteracy.

Other Examples of Effective Messages or Themes

Let's look at examples of messages or themes developed for other social marketing campaigns that have effectively communicated to special groups:

Being retarded never stopped anyone from being a good neighbor.

Early help makes a difference.

Just say no!

Reading is fundamental.

Now, apply the following questions to the above messages and analyze your answers:

-- Where did you see it/hear it?

-- Why did/didn't you remember it?

-- Does it leave you with a positive or negative feeling?

-- Would you support this service or tell someone about it after hearing/seeing this message?

-- Do you know why or why not?

You will notice that most jingles, messages, themes, contain less than seven words. Only one of the above themes has more than five words. After reviewing your material on your particular market segment and the information in this section, begin to think about a theme for the target population you want to reach. This theme should also have less than seven words. Don't hesitate to play with current jingles, songs, sayings, or common expressions. Workshop participants came up with these:

-- *Your GED Is Just Around the Corner*

-- *Get Fresh for the Future*

-- *Deposit your Time — Bank on your GED*

-- *Your GED — Don't Leave School Without It (Substitute name of town for School)*

-- *Are You Where You Want to Be? Get in the Swim!*

--*It's a Family Affair* — Bring Someone you Love

The more familiar the theme sounds, the better. Think about it in the shower, in your car, when you're taking a walk, sitting in the park. Your subconscious will continue to work on the theme while you're doing something else. And all of a sudden — aha! You'll have it! Write it down below.

Choosing Promotional Activities

Now that you know what image you wish to project, what values need to be communicated, and what your goals are, what theme will permeate your campaign, and how are you going to get the word out? This is done by carefully choosing a number of promotional activities. There are standard ones which will be addressed later in this chapter. But before we get to those, your own creativity and special knowledge of your community will enable you to generate multiple approaches to reaching your market segment. What types of promotional activities will reach and motivate the people you want in your program? Here are some examples from previous workshops:

-- informational brochures
-- posters
-- bumper stickers and decals
-- gift certificates
-- door-to-door promotion
-- word-of-mouth
-- use of churches
-- video presentations in community spaces
-- story books
-- promotional messages over loudspeaker systems in supermarkets/shopping centers
-- flyers brought home to families through children in K-12
-- personal contact
-- use of referral agencies

The above list should give you a start. Keep going! Where does the market segment congregate? Identify the places. Then think about what you can do there. Video? Personal presentation? Hand outs? Involvement of local heros? List your ideas below:

There are standard means by which you can promote your adult literacy program and you need to know more about them. To begin, explore a number of alternative media to get your message across. Select the best media for your program. Written communication provides a permanent record, carries the weight of authority, and is less expensive than TV/radio advertising and meetings. A brochure, for example, will often be less threatening and less complex. Television and radio tend to be less boring than written communication, easier to understand visually, and less threatening, but more expensive.

Put your ideas about your program in words that are clear. Avoid long sentences, emotion-laden language, and poor organization. Be aware of the participant's sensations of reading, seeing and hearing. Failure to do so will result in a non-message. If your program looks or sounds like the "same old thing," looks or sounds too long or too difficult, your program will be ignored. Clear communication directed to your client's interests, needs, and educational level helps lessen the chance for a communication breakdown.

"What's in it for me?" (WIIFM) is a natural question for prospective participants. They may understand your message but not accept it. Showing the recipient how your goal and theirs coincide and giving reasons for accepting the message help make it less threatening. If your message is understood and accepted, you'll have active participation in your program.

Think WIIFM!

The following several pages describe various media and ways in which you can use them in your campaign.

A Closer Look at Media

Newspapers

Daily, weekly, suburban and minority newspapers offer endless opportunities for outreach to readers in the general public. As the recognized literacy spokesperson in your area, you may be approached by the staff of one of these newspapers for comment on a wide range of subjects. Reporters seek out elected officials, business people, and other specialists on issues that affect the community. So why not a literacy spokesperson like yourself who can comment on the high cost of adult illiteracy, for example, or on other literacy issues?

Whatever the reason behind an article, literacy spokespersons can take advantage of newspaper publicity as a marketing tool to promote projects/services and outreach to the general public and the community about an important issue or event.

But, before you consent to having an article written, it's important to define your audience. Ask yourself the question, "Who am I trying to reach?" Define your topic and your main points.

Asking the right questions and providing the appropriate information are part of learning about newspaper publicity. For instance, newspaper journalists cover several basic points when writing a newspaper story. The questions they ask are, "Who, what, when, where, why and how. These points are crucial to any story. The following are some tips for newspaper stories and contacts.

Hard news — For day-to-day news, comments, reactions and press releases, contact the city editor. Get to know him/her as he/she assigns stories to reporters. If you have been working with a particular reporter, be sure that both the city editor and the reporter receive copies of your press releases.

Feature stories — Many large papers have feature editors who concentrate solely on vignette-type stories of local interest. For example, if a prominent person in the area volunteers to help with outreach, you may want to see if he/she would be willing to be interviewed about the importance of the program and how others could help, too. Then, contact the feature editor with your story idea.

Editorials — Meet the editorial page editor; make sure he/she knows he/she is welcome to call you for information on literacy issues.

Letters to the Editor — These letters have high readership and are a good way to support or refute the paper's positions. Keep letters short, accurate, and to the point.

Events stories — Plan to start early, before the day of the event. There may be coverage before the event announcing that it will happen, during the event, and after the event, analyzing potential impact.

Eight Steps to Better Press Releases :

(1) Begin with a good headline. Remember that the headline is an abbreviated version of the main point of the press release. Make it catchy, but not cute, and stick to one- and two-line "heads."

(2) The first sentence is called the "lead" sentence that answers the basic questions asked by journalists: the who, what, where, when, why, and how.

(3) The following sentences should expand on information stated in the lead sentence. The following paragraphs should be of declining importance. This structure permits an editor to cut the story from the bottom if space is tight, and not lose an important element of the story. Also, you have to capture an editor's eye and interest immediately with the most important points of the story.

(4) Write short sentences and paragraphs. Two sentences make a good paragraph for copy that will be printed in two- or three-columns.

(5) Give exact dates. Use "October 1, 1976" rather than "next Monday" or "tomorrow." Check all days and dates on a calendar.

(6) Give the address as well as the name of the meeting place.

(7) Follow an editor's points of style. (See next page.)

(8) Lastly, place the date, telephone number, and a contact person across the top of the press release on your letterhead. It's acceptable to send out press releases which are typed or printed on an attractive letterhead. Remember, double-space and write "more" at the end of your first page if the release is two or more pages, and "#" at the end.

A Quick Look at an Editor's Points of Style:

Spell out numbers from one to ten. Use numerals 11 and above. Do not begin a sentence with a numeral.

A person is "of" a company or organization, not "for" or "at." A person resides "in" a city, not "at."

For example: Jane Smith of the Adult Learning Center in Oneonta, New York...

The letter "b" in the word "black," when referring to this particular minority, is lowercase, but "Hispanic" begins with a capital.

Use an organization's full name on the first reference, followed by its acronym. Use the acronym for second and following references.

For example: New York State Education Department (NYSED)

If an acronym/abbreviation has become a recognized word or is pronounced as a word, it may be either in caps and lowercase or all caps.

For example: NATO, Alcoa

For further points of style, it's a good idea to use one of the standard books that editors use, such as *The New York Times Manual of Style and Usage*, *The Associated Press Stylebook and Libel Manual*, etc.

A Closer Look At Media: **Television**

Television offers a variety of options for outreach to non-readers. Let's look at some of the requirements for this medium.

Hard News

Film coverage of an outreach event could be very useful. Some examples would be the opening of a new adult literacy program, a former adult student's success story, or a look at illiteracy through the eyes of a client. Remember, in order to get visual coverage of your event, it must not only be visually interesting to you, but also to that "person next door." If possible, include promotional materials for the background such as posters, banners, or signs — something that conveys your message or slogan.

Attracting visual coverage of your outreach events or activities also requires attention to time constraints; that is, within any given newscast, one minute is a long story and should you receive two minutes, consider yourself lucky. That's why it's a good idea if you, or your speaker, can summarize the points you want to make in one paragraph so that the cameras can roll and you can make your point clearly and quickly.

Editorials

Today, nearly all television stations editorialize on local if not national issues, although it seems that less time is being devoted to this type of coverage.

Editorial reply

Most television stations generally offer a reasonable amount of time for opposing views. Keep on top of what your television stations are editorializing on and whenever a rebuttal or opposing view is called for, offer a clearly thought out, intelligent, and knowledgeable editorial reply to support your viewpoint

Public affairs shows

The newscast may devote 30 seconds or one minute to your outreach activities. After that, the Public Affairs Department may take over as an extension of the news and may want to create an entire show around adult literacy.

Public service announcements (PSAs)

By law, television stations must provide free time "in the public interest." The criteria for these spots (generally 10, 20, 30, and 60 seconds) are that they be "informative and/or educational."

Talk shows

Most stations have some type of locally-originated talk shows about subjects that range from gardening to government. You may want to find out what shows are available and open to guests and arrange for a literacy spokesperson to be a guest.

Bulletin boards and community announcements

Frequently, and often daily, TV stations will announce the events of importance to the community for that day. Be sure to inquire if your stations offer this service for their viewers, and if so, use the opportunity to promote local outreach for literacy.

Tips for Television Appearances

For women:

Stay away from patterns. Try to select solid colors, especially blue.

Avoid dangly jewelry and boots worn with skirts.

For men:

Avoid ties with small prints. A striped tie is much better than one with small prints.

When it comes to shirts, stay away from striped shirts because they begin to "wave."

For everyone:

Unfortunately for talk show guests, many stations put swivel - type chairs on the set for the participants. Remember to plant your feet firmly on the ground. Nervousness tends to make everyone begin to swivel in their chairs, so try to sit still.

A Closer Look at Media: **Radio**

Radio offers the same outlets as television — only more. And like television, radio is an excellent medium for reaching non-readers. Let's look at the requirements for radio.

Hard news	Summarize your main point in a couple of sentences, so that the edited version of your interview or story will contain at least one concise statement. Be brief and to the point. A good tip for accomplishing this summarization of your newsworthy item is to practice with a watch with a second hand. If you can present your information in 30- and 60-second "spots," you are ahead of the game.
Editorials	Contact the program director ahead of time and ask about requirements, if any, for editorials.
Editorial reply	As with television, keep on top of recent editorials and offer a knowledgeable reply.
Public affairs shows	Same as Television.
Public service announcements	You have a much better chance of getting on the air because radio has more free time to devote to PSAs. It's a good idea to call ahead of time and ask about requirements for PSAs (live scripts, cassettes, reel-to-reel). Time your PSAs and make sure that they fit the 30- and 60-second format.
Talk shows	Same as television, but without the swivel-type chairs. But, many radio formats feature call-in shows as part of their regular programming.
Call-in shows	Here's the real difference between radio and television that can add an entirely new dimension to your publicity. Whenever you prepare a comment on a national or local aspect of outreach for literacy, write out your key points so that you will not forget them. Rehearse this statement so there are no tongue twisters in it, and make it short and concise.

Who contacts the news media?

If you work in a large organization with its own public information officer, or if someone on the staff is assigned that responsibility, be sure to check with that person beforehand to coordinate any media activity you might be planning. Chances are, the public information staffer will have valuable ideas to generate more attention for your project.

If there's no staff person assigned to public information, then it's a good idea to develop your plans and clear them with your supervisor *before you initiate any media contact*. Also coordinate with the local educational agency (school district) if you are not already part of their program.

What makes a news item? Ask yourself, "Is what I want to say important or interesting to the person who lives down the street?" If not, it's probably not very newsworthy. If it might be, you can begin to plan your strategy to get attention.

Radio and Television Contacts

Let the nature of your request determine whom you should contact at the station. Remember, if you are told that the station does not have the person you're asking for (i.e., public affairs director, program coordinator, etc.), then *always ask for the news director*. He/she will be happy to redirect you if necessary. Depending on the size of the radio and television station, you may have to contact one of the following people:

Program director	Oversees everything at the station, including news, public affairs, public service, editorials, and programming. Specifically, he/she determines which shows are produced and what they contain. Contact the program director for information about guest appearances.
News director	Handles day-to-day news. See him/her about local news releases. Get to know the news director so that you can keep him/her up-to-date on literacy outreach efforts. Remember, an updated news story that is run every hour, all day long, is frequently worth more than a 10-minute segment on a talk show in the middle of the night.
Public affairs director	Gives the longer presentation of news for the day, beyond the scope of the regular newscast. A public affairs show may be broadcast daily, weekly, or just as a special documentary running five to 30 minutes on a subject that was only briefly mentioned in the newscast.

Editorial director	Handles the station's editorial opinions as well as all editorial replies.
Public service director	Responsible for 10-, 20-, 30-, and 60-second public service announcements that are free to groups and organizations.

A Look at Madison Avenue and What They Do Best - Packaging

Think about what you've done since you began: you've identified the market segment; familiarized yourself with your market segment; identified an image, a theme and objectives; and listed a number of promotional activities designed to reach your population. But how do you communicate an image that is an overall picture, but intangible? How the image will be presented, how it will be contained, and how it will look is called packaging.

Before we go on, we're going to take a quick look at the history of packaging. Prior to the nineteenth century, the concept of packaging was limited to a container such as a wine cask which held and transported a product. No thought was given to preservation or protection of the product. With the advent of the metal can (patented in 1810) and the glass bottle (patented in 1899), the package not only contained the product but preserved and/or protected it at the same time.

What happened next was a dramatic alteration in marketing strategy incorporating the growth of brand identification. If the product is going to be packaged, why not have the container say something about the product? Packaging then became the keystone to marketing and consumer response.

The significant factors to consider with modern packaging are:

-- **Name**
-- **Labeling**
-- **Color**
--**Shape/Size**

Under "Name," think of some products with names that really express what the product is. Think of Bold — Gleem — Scope — Hefty — Slice!

Then think of what colors communicate: red draws attention; blue is cold, dramatic; oranges and yellows are warm.

Next, think of your image at the same time you think of labeling and the kinds of graphics you want. If the cola "Jolt" is available in your area, look at those graphics and the jolt of lightning. Is there any doubt what the product does, even if you can't read?

Finally, consider shape and size. Plan the shape and size of the media you are going to use.

Will the posters have to be read from a long distance?

Do you want the brochures to conveniently fit in someone's pocket?

Where will your video setup be?

Is the affect maximized as it's arranged?

Be sure to think back to Maslow as you're making your decisions about packaging. You want your "product" packaged in such a way that it has appeal to the potential "buyer."

Again, what are the most powerful needs of those buyers?

What are their fears, anxieties and uncertainties?

Will your product satisfy the potential buyers' needs and allay their fears in a desirable way?

Working individually, describe how your marketing program will be packaged. Colors? Sketches? Sizes and Shapes?

PACKAGING OF MARKETING PROGRAM

Identifying Resources to Get the Job Done

As you're developing the marketing campaign, you need to be thinking about implementation planning. You will not mount this campaign alone, and you will only succeed with as much cooperation and support as possible from persons within your agency and within your community.

To aid in this process, state clearly and examine carefully those situations and persons that are working for and those that are working against the successful achievement of your goal. In other words, look at your resources and your barriers. The methodology you will use to help in the process is known as force field analysis. This analysis consists of the recording of your resources and constraints both within and outside your agency.

To help you structure your thoughts, you will find on the next page a sheet entitled *Force Field Analysis*. It is particularly important as you begin to identify constraints or barriers which will interfere with the implementation that you are also thinking about ways to get around those barriers in order to carry out your plan. Likewise, as resources are identified, you must also strategize how they can be maximized to be of most benefit to your program.

Exercise #3

FORCE FIELD ANALYSIS

Inside Your Agency

Resources/Forces-----> **<-----Constraints/Barriers**

FORCE FIELD ANALYSIS

Outside Your Agency

Resources/Forces-----> **<-----Constraints/Barriers**

Look at your results. Are you sure you have included all resources? Have you been truly creative dealing with constraints and barriers? Go back to your work after a few days and make sure your information is complete.

Now that you have identified all the resources, you should be able to develop an implementation plan for the marketing campaign. This plan generally includes a listing of major activities which are then broken down into tasks. For each of the activities and tasks, list who is the responsible party. Also included will be a time frame for each segment of your plan.

Exercise #4

IMPLEMENTATION PLAN

Objectives:

Major Activities	Tasks	Responsibilities	Date

Evaluating a Social Marketing and Public Relations Campaign on Adult Literacy

Evaluating your marketing campaign is a continuous process, as the need for revision is always present. More importantly, evaluating the effectiveness of the promotional activities allows you to be selective, thus achieving the best results.

One way to measure the effectiveness of your activities may be monitoring — recording the number of times television and radio public service announcements are broadcast. Or, you might compile a book of press clippings.

If you have left brochures in a supermarket or a barber shop, go back and see how many are left. If you have to blow the dust off the pile, you know this place is not the right one for your material!

If you have given a video presentation in a shopping center or other public site, keep track of the number who are really watching, who seem interested, and who pick up material.

Keep track of where the material is and find out if it is effective there. Establish indicators to compare with the results of your promotional activities.

-- *What's working?*
-- *What isn't working?*
-- *How must you change your campaign?*

When prospective students call or come to your literacy program, ask them how they heard about the program. It's important that you take the time to assess all of the means by which the information has been received. We know from marketing research that it is rarely a single message that results in action behavior but rather a series of messages that "nest" until favorable behavior (from the point of view of the advertiser) takes place.

-- *What are **all** the messages the student received regarding coming to your program?*
-- *Where were they received?*

Consider color coding your marketing material if you are going to be using the same material differently or leaving it in different places. Then you can ask the caller or student when he/she comes to your program the color of the coding.

Look back at your promotional activities. Look at your indicators of success. List how you are going to evaluate to see that the activities are achieving your goals. The bottom line is: are you attracting your market segment? Based on your information, you can make recommendations and improvements for both the immediate and near future.

The following are some forms on which you can collect data.

MONITORING RADIO PUBLIC SERVICE ANNOUNCEMENTS

Radio Station: _____

Contact Person: _____ Phone #: _____

Fax #:

_____

Address: _____

_____

Have I aired a literacy PSA? (If Yes, please continue) Yes _____ No _____

What is the start of my work week? _____

RECORD OF TIMES AIRED

Week #	Dates	Number of Times Aired
1		
2		
3		
4		
5		
6		
7		
8		
9		

Do you, as a provider, have any suggestions for improvements on literacy radio PSA's?

_____

_____

Monitoring Television Public Service Announcements

Station: _____

Contact Person: _____ Phone #: _____

Fax #: _____

Address: _____

_____

Have I aired a literacy PSA? (If Yes, please continue) Yes _____ No _____

What is the start of my work week? _____

RECORD OF TIMES AIRED

Week #	Dates	Number of Times Aired
1		
2		
3		
4		
5		
6		
7		
8		
9		

Do you, as a provider, have any suggestions for improvements on literacy television PSA's?

_____

_____

Record of Press Coverage

Total number of print articles for:

Newspapers _____

Magazines _____

Newsletters _____

Attach photocopies of all articles in this evaluation.

Article	Publication	Topic	Date

For radio and television public service announcements, evaluate during the start of the project, at the middle, and end. All print media should be collected on an ongoing basis and should be evaluated as the need arises, although you could follow the same three-stage evaluation.

Once your three-stage evaluation is completed, compile your findings in a narrative form complete with statistics. This information should be shared with your project staff and others who may request it. Recommendations for changes are also an important part of this process, so remember to include these short- and long-term recommendations.

In addition to measuring the success of your marketing campaign, you need to look at your adult literacy program to see if it is achieving its purpose.

Once the market segment gets to your adult literacy program, is it staying?

If not, why not?

There are two parts to be considered when answering these questions:

Do the potential and/or registered students feel welcome when they come?

How are they treated by staff, all staff — the instructor, the secretary, the administrator, the maintenance person? *The way each staff person interacts with the student coming in the door tells that student whether he/she is welcome.*

Another factor which is related to a student's staying in an adult literacy program is the extent to which the prescribed program meets the needs of the student or client. Here are some suggested forms to help you gather information about the match between students and services.

ASSESSING THE MATCH BETWEEN SERVICES AND STUDENTS

INSTRUCTIONS: Complete the following match assessment form and student surveys. Once these are completed, collect the student's academic records or progress reports and assess the match between service and client in a report form.

Name: _____ Date: _____

Program/service: _____

Briefly describe your program/service:

_____

_____

_____

State highlights of the program/service:

_____

_____

_____

_____

State adult student's characteristics:

_____ _____

_____ _____

_____ _____

_____ _____

Continued on next page

State student's needs, such as evening classes, transportation, bilingual education, etc.:

_____	_____
_____	_____
_____	_____

Does your program cover the student's needs? Yes _____ No _____

Please describe:

_____

_____

_____

_____

List other public and private literacy efforts in your area and their highlights:

Literacy Effort	Highlights
_____	_____
_____	_____
_____	_____
_____	_____

List gaps and matches in available services:

Gap	Match
_____	_____
_____	_____
_____	_____
_____	_____

STUDENT SURVEY

INSTRUCTIONS: Select a random sample of adult students. Read questions aloud to students or provide assistance. Once the survey is completed, compile findings.

Student Characteristics:

_____ _____ _____

_____ _____ _____

_____ _____ _____

Reading Level: _____

1. What barriers do you face (transportation, day care, etc.)?

   _____

   _____

2. What is most helpful to you about this program?

   _____

   _____

3. What is least helpful about this program?

   _____

   _____

4. What would you like to see added to this program?

   _____

   _____

5. In what ways can we as educators better serve you?

   _____

   _____

6. How did you hear about this program?

   _____

7. How can we reach other adult students like yourself?

   _____

8. On a scale of one to ten, does this program/service meet your needs? (one is least able to meet needs, while ten is most able to meet needs.)

   _____

REPORT FORM

INSTRUCTIONS: Based on your findings, assess the match between students and services. Be sure to explore the service/program's strengths as well as its weaknesses. Duplicate this form if more than one is required.

Service/Program Findings: _____

_____

_____

Student Survey Findings: _____

_____

_____

Strengths and Weaknesses: _____

_____

_____

General Assessment: _____

_____

_____

Short-term Recommendations: _____

_____

_____

Long-term Recommendations: _____

_____

_____

_____

_____

Completing Your Marketing Plan

As you look back on your trip through this manual, you will discover that you have now completed your marketing plan. You started by choosing and defining your market segment. The last questions you asked were:

Are students from the identified market segment coming to the program?

Do they stay after they get here?

The last form to fill out will be your total marketing plan. Go back through your work; make any improvements you see that need to be made. Use the form on the following page for your final copy.

Finally, you probably have to "sell" your marketing plan to a higher authority — your administrator, your board, your coordinator. Improve your chances for success by role playing the meeting with the decision maker(s), anticipating the objections and "shortcircuiting" them, and emphasizing the advantages to the agency or organization. Supportive colleagues will often help in this endeavor. Ask them to "play" the decision maker(s) in the role play. Often they will get so involved that the real presentation will seem like child's play. If role playing seems silly to you, just remember the Scout's motto: Be Prepared!

We hope developing your marketing campaign has been fun for you. The marketing of adult literacy services to prospective adult learners is indeed a challenge. Your sensitivity to the needs, desires, fears and uncertainties of the target population and your particular market segment should make the job easier. We hope that the marketing plan will help recruit the clients you want to come to your program. However, this plan does become "one more thing" to add to your "to do" list, which is already lengthy. But if all members of your community who need adult literacy services are represented in your program, then your image in the community will be strong, respected, and worthy of support. And the community's support is critical to the success of your program. We hope this helps. Good luck!

MARKETING PLAN

Market Segment: _____

Marketing Campaign Theme: _____

Objectives: _____

_____

_____

Image: _____

Promotional Activities: _____

_____

_____

Packaging: _____

Implementation:

-- campaign: _____

_____

-- convincing decision makers/eliciting support of helpers _____

_____

--involving total community/neighborhood: _____

_____

Evaluation: _____

_____

_____

_____

_____

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